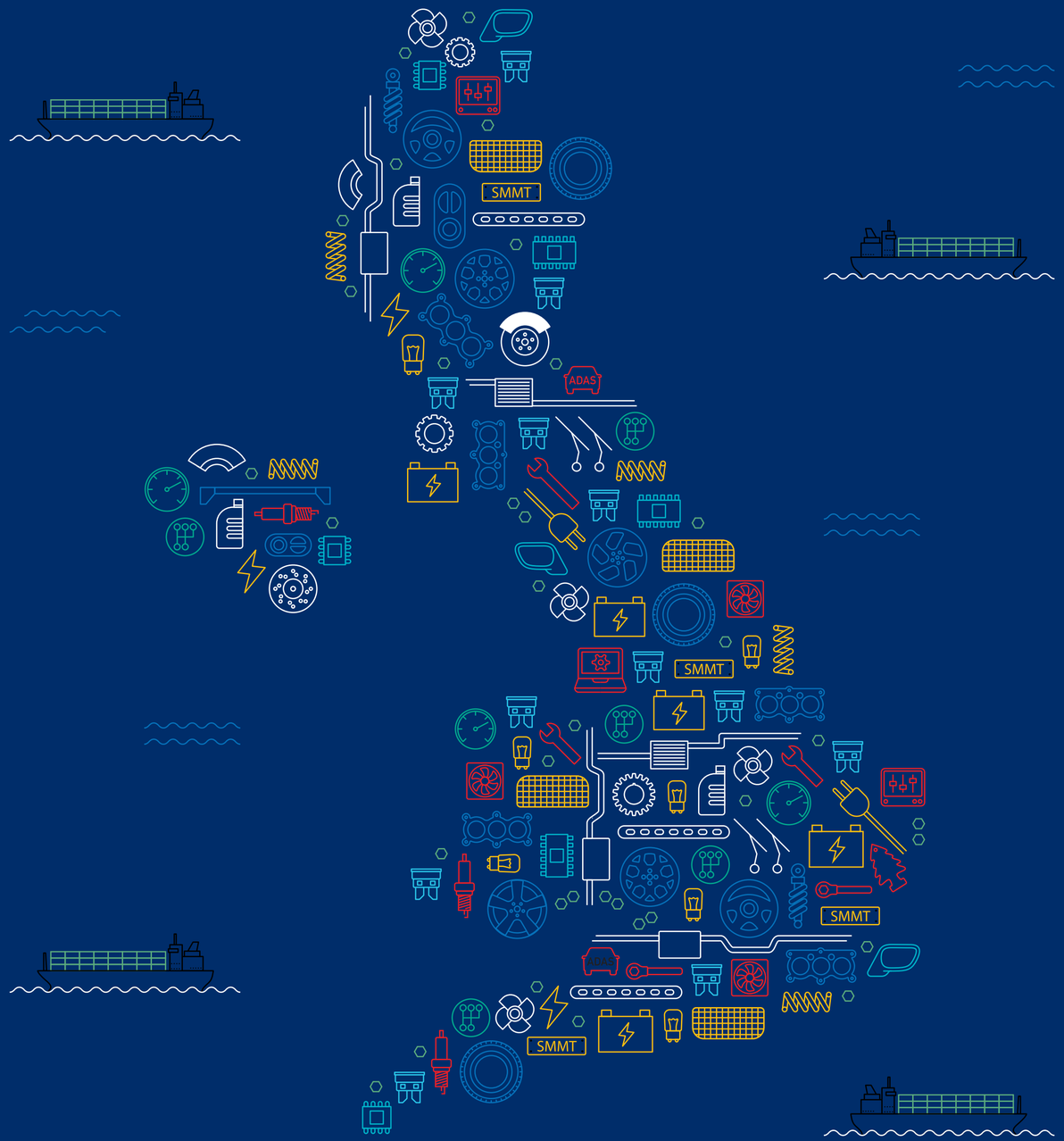


SMMT
DRIVING THE
MOTOR INDUSTRY

JOBS, GROWTH, MOBILITY:

WHAT THE AFTERMARKET NEEDS TO DELIVER

2025

“The sector must remain agile, redoubling its responsiveness to stay consumer-focused, while also advocating for regulatory support and the frameworks necessary to safeguard competition and preserve choice.”

FIT FOR THE FUTURE AFTER A CENTURY OF SERVICE

Vehicles and maintenance have gone hand-in-hand since the late 19th century. What began with a few hundred pioneering motorists relying on visits to blacksmiths, chemists and coach builders has evolved into a sophisticated ecosystem supporting more than 42 million vehicles[1] and tens of thousands of workshops[2] across the UK.

Today, the aftermarket features independent chains, manufacturer approved repairers, tens of thousands of single-site workshops, thousands more franchised workshops and highly sophisticated parts distribution networks that deliver quickly, conveniently and efficiently to workshop and consumer alike.

Online marketplaces further expand access to parts, while the rise of mobile driveway services bolsters the support offered by well-established emergency roadside assistance providers.

Together they provide consumers an abundance of choice in vehicle servicing, maintenance and repair. Including accessories, the sector is estimated to contribute approximately £17 billion to the UK economy and support at least 339,000 jobs.[3]

At present, the industry stands on the cusp of one of its most significant transformations. Electrification is at the forefront of this shift, but other technological advancements are equally impactful. Innovations in Advanced Driver Assistance Systems (ADAS), including Adaptive Cruise Control, Autonomous Emergency Braking, Lane Keeping Assist and Blind Spot Monitoring, and vehicle connectivity such as smartphone integration and real-time traffic alerts, are reshaping customer expectations and challenging the market to stay aligned with emerging technologies.

As a result, every facet of the service and repair market must adapt and evolve – just as it always has – to continue delivering the quality and choice consumers expect.

Collaboration between vehicle manufacturers and the independent aftermarket is vital. Not only does this enhance customer experience and protect brand integrity, but it ensures servicing and repair remains convenient and cost-effective, while reinforcing confidence in the very vehicles that are at the heart of it all.

Now, one quarter of the way through the 21st century, the aftermarket can rightfully celebrate its contribution to mobility and safety – but can never rest on its laurels. The sector must remain agile, redoubling its responsiveness to stay consumer-focused, while also advocating for regulatory support and the frameworks necessary to safeguard competition and preserve choice.

Mike Hawes

Chief Executive
The Society of Motor Manufacturers and Traders (SMMT)

AUTOMOTIVE AFTERMARKET HISTORY

As the first automobiles emerged in the late 19th century, a new need quickly followed – the maintenance of these increasingly complex machines.

When the Society of Motor Manufactures and Traders (SMMT) was established in 1902[4], fewer than 1,000 cars were on UK roads. At that time, maintenance was typically handled by the original vehicle manufacturer or undertaken by tradespeople such as blacksmiths.

Fuel was primarily sold by chemists, reflecting the rudimentary infrastructure of the era – a far cry from the choice available today. Meanwhile, the Automobile Club of Great Britain was founded in 1897 and later received Royal approval from King Edward VII in 1907, making it the Royal Automobile Club, or RAC as it is known today.[5] In 1905, the Automobile Association further formalised the support network for motorists.[6] The need for maintenance continued to grow throughout the early 20th century as mass production capabilities increased and vehicle ownership grew in popularity.

Between 1920 and 1930, the number of vehicles on UK roads surged from just under 200,000 to more than one million.[7] By this time, dedicated service, maintenance and repair (SMR) workshops and petrol pumps had become a familiar part of the motoring landscape.

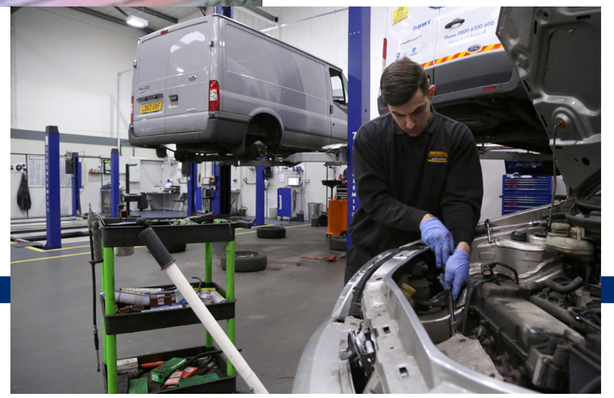
During the Second World War, the UK government (via the Board of Trade) commissioned SMMT to produce a report detailing the industry's manufacturing capacity, employment and capital equipment. Resultingly, the Motor Industry Research Association (MIRA) was officially established on 1 January 1946. It grew out of the Institute of Automobile Engineers and SMMT, later moving in 1948–1949 to its permanent testing site in Nuneaton.[8]

In the second half of the century (1960 onwards), the Ministry of Transport (MOT) introduced a voluntary roadworthiness test for vehicles over 10 years old. The test became compulsory the following year, and, due to high failure rates, the initial testing age was reduced to first presentation after three years in 1967 – a valuable policy that remains in place today.[9]

While vehicle registrations were historically managed by local county councils, a shift towards centralisation began in the late 1960s. In 1966, the UK government initiated discussions with SMMT to establish a national system, leading to the Vehicle Driving Licenses Act, which received Royal Assent in 1969.[10]

The Driver and Vehicle Licensing Centre (DVLC) in Swansea began operations in 1968–69 and formally assumed responsibility for vehicle registrations from local authorities in 1974. In July 1972, SMMT launched the Motor Vehicle Registration Information System (MVRIS) utilising data from the new centralised system.[11]

DVLC was rebranded as the Driver and Vehicle Licensing Agency (DVLA) in 1990, becoming an executive agency of the Department for Transport. SMMT has continued to operate MVRIS, providing monthly data on new vehicle registrations sourced from manufacturers, importers and DVLA records.



AFTERMARKET VALUE

This report focuses on the independent service, maintenance and repair (SMR) sector for cars, sector for cars, drawing on consultations with businesses to understand how well-equipped they feel for the future. Are skilled technicians readily available? How supportive is regulation? And what does the sector believe consumers value most?

We also commissioned Censuswide to survey businesses and consumers[12] to explore how closely their views align – including regarding the future role of the MOT and accessibility of services for rapidly emerging technologies such as electric vehicles and advanced driver assistance systems.

This report gets under the bonnet to find out what's running smoothly, what's quietly ticking over and what may require some fine-tuning, whether that's regulation, enforcement or the approach the aftermarket itself is taking.

Finally, we offer recommendations to both industry and government, with the aim of safeguarding and supporting consumer choice and access to the high-quality maintenance modern vehicles need.

VALUE OF THE UK AFTERMARKET

RECORD TURNOVER & GVA, BUT EMPLOYMENT DIPS

SIC45.2 (Maintenance & repair motor vehicles)
45.31 (Wholesale trade of mv parts & accessories)
45.32 (Retail trade mv P&A)

Number of businesses
57,572
+1.8%

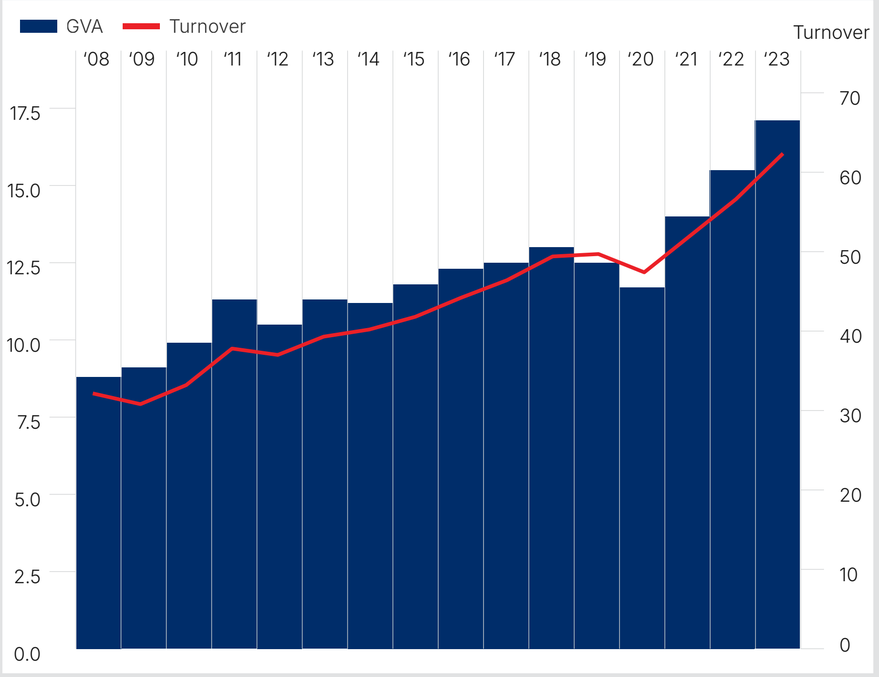
GVA
£17.1bn
+10.3%

Turnover
£62.2bn
+9.9%

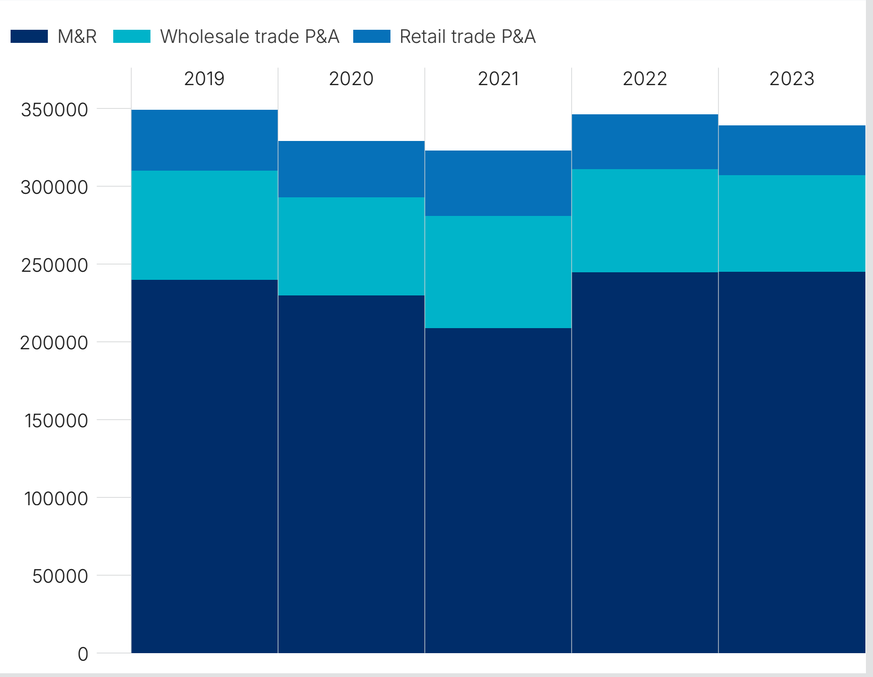
Employment
339,000
-2%

	Number of businesses	Turnover £bn	GVA £bn	Employment
2019	53,606	49.7	12.5	349,000
2020	54,806	47.4	11.7	329,000
2021	57,153	52	14	323,000
2022	56,547	56.6	15.5	346,000
2023	**57,572**	**62.2**	**17.1**	**339,000**

TURNOVER AND GVA (£BNS)



AFTERMARKET - EMPLOYMENT



GROWTH DESPITE CHALLENGE

The UK economy has faced a series of profound challenges over the past five years, yet the aftermarket for service and repair has continued to grow.

In preparation for Brexit, parts inventories were significantly, and presciently, increased to maintain availability. As the UK transitioned to third-country trading status with the EU, even routine shipments encountered new complexities. This early response proved invaluable, particularly given the vast scale and complexity of aftermarket parts catalogues, with distributors holding well over 100,000 different parts in stock to match the need of the UK's diverse vehicle parc.[13]

Strategic stockpiling was a vital asset during the Covid-19 pandemic, enabling the aftermarket to keep essential vehicles on the road during an immensely difficult time. SMMT and the sector worked closely with government to navigate this period, including managing the significant shifts in demand for MOT testing caused by six-month presentation extensions.[14]

The closure of the Suez Canal following the grounding of the Ever Given added further disruption. And more recently, the sector was impacted by activity from Houthi and Somali groups placing additional pressures on shipping routes through the Red Sea, Gulf of Aden and Suez Canal.

OVERALL VALUE OF THE AFTERMARKET

Using three key Standard Industry Classification codes (45.200 Maintenance and Repair of Motor Vehicles; 45.310 Wholesale Trade of Motor Vehicle Parts and Accessories; 45.320 Retail Trade of Motor Vehicle Parts and Accessories), the Office for National Statistics (ONS) estimates the service, repair, parts and motor accessory market to have an annual turnover of £62.2 billion, while contributing £17.1 billion to the UK economy and supporting some 339,000 jobs.[15] This overall figure represents the service maintenance and repair of all vehicle types, including car, light trailer and commercial vehicles, alongside the distribution of parts required for SMR and accessories such as bicycles and camping equipment – available from wholesale and retail traders.

It is possible, therefore, that the overall figure may include an element of double counting as parts travel down the chain from supplier to distributor to workshop.

Nevertheless, the data set provides a useful and consistent historical record which shows the value of the aftermarket sector and how its contribution has grown substantially over the last three years, while the gross value add and turnover have almost doubled since 2008.

Service maintenance and repair accounts for 56% of the overall value of the UK aftermarket, according to the ONS, equating to a turnover of £34.9 billion. It is not possible to break this figure down through ONS, but given cars accounts for 86% of vehicles on the road,[16] their maintenance account for the lion's share of this figure.

We will explore in more depth later but results from one of our report surveys, exploring consumer habits, shows that motorists prefer to take their car to independent servicing channels 72% of the time.[17]

Annual turnover
£62.2bn

£34.9bn
Maintenance and Repair turnover

72%
of motorists choose independent workshops

THE FUTURE FOR THE AFTERMARKET

The diversity of the UK car parc (the total number of vehicles in use) has always demanded agility from the aftermarket. This is particularly true for the independent sector, where workshops are expected to service a broader range of models than a brand-specific dealership. Distributors and online marketplaces also stock an extensive array of parts to meet varied service, maintenance and repair (SMR) needs.

Over the past two decades, the proliferation of car models has accelerated significantly, driven by growing consumer demand for individuality, changing propulsion technologies and diverse customer requirements. Platform modularity has enabled manufacturers to launch a variety of body types, with more than 385 distinct models available in the UK today compared with 318 in 2005.[18] While some parts commonality has been fostered, the increase in models has placed increasing pressure on workshops to service a wider range of vehicles.

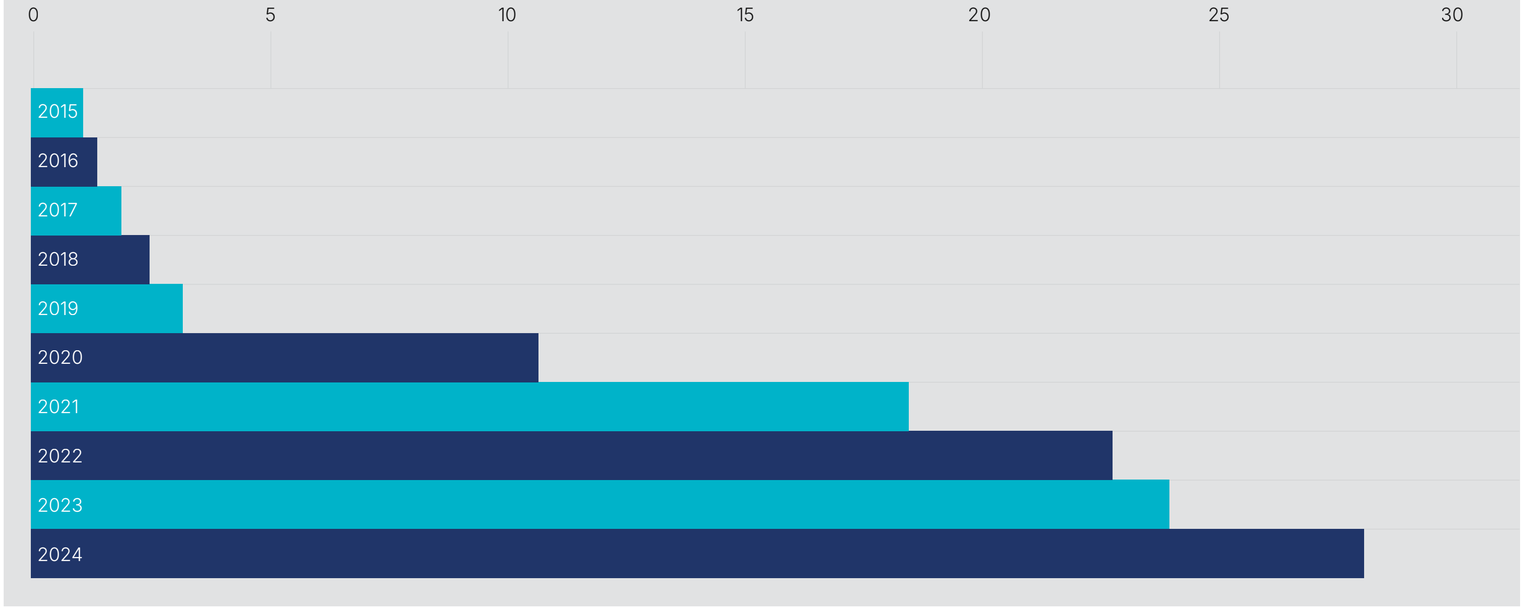
Interestingly, although there has been an influx of Chinese brands over recent years a comparison with 2005 shows there is only one more brand in 2025 compared with 2005 as others have exited the market.[19]

This may help to reduce the number of data access websites and tools needed to deal with the breadth of the vehicle parc, and bring some parts commonality, but the increase in models has placed increasing pressure on workshops to service a wider range of vehicles.

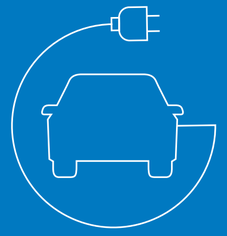
This diversity presents challenges for vehicle manufacturers, too, particularly in developing and disseminating repair methods. SMMT continues to work with members and stakeholders, including the Department for Transport (DfT), Thatcham Research and the Association of British Insurers to ensure a cost-effective transition to electric vehicles (EVs) in particular.

A DECADE OF GROWING BEV AND PHEV REGISTRATIONS

BEV AND PHEV COMBINED SHARE OF NEW CAR MARKETBASED ON THE RAW VOLUMES OF CAR REGISTRATIONS, 2015 VS 2024 - (PHEV AND EV COMBINED HAVE INCREASED BY 17.9%)



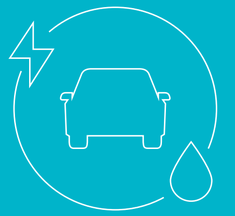
PROJECTIONS FOR EV AND PHEV REGISTRATIONS (JULY OUTLOOK):[27]



BEV cars:

472k in 2025
23.8% share

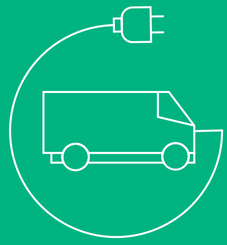
569k in 2026
28.2% share



PHEV cars:

217k in 2025
10.9% share

240k in 2026
11.9% share



Vans:

28k in 2025
8.6% share

47k in 2026
13.7% share

Currently, however, there is a lack of data available to understand the insurance sector's approach to electric vehicle repairs. More information would allow for appropriate actions and more constructive work to be done. Beyond the task of servicing EVs, the aftermarket is also adapting to the increasingly complex technologies on the market. Continuous innovation by vehicle manufacturers and component and systems suppliers has introduced a host of advanced technologies that require ongoing adaptation and development in SMR practices.

The Zero Emission Vehicle (ZEV) mandate sets rising annual targets through to 2030, with 80% of new cars and 70% of new vans registered in the UK required to be fully zero emission by this date. Additionally, the UK government has committed to ending the sale of all internal combustion engine cars by 2030, with only hybrid (HEV) and plug-in hybrid (PHEV) cars permitted to be sold after this date. From 2035, all new cars and vans registered in the UK will be required to be fully zero emission.[20]

Reliability, comfort and convenience all play central roles in consumer satisfaction, alongside entertainment, style and performance. And the pace of change is relentless. Increasing environmental and safety requirements, either through consumer expectation or regulation, are also driving huge strides in innovation.

Competition for customers has driven decades of this innovation by vehicle manufacturers in these areas as well as in safety systems.

Initiatives such as the Euro New Car Assessment Programme (NCAP) crash test ratings, introduced in 1996,[21] have further incentivised the deployment of new safety systems ahead of any mandate through regulation.

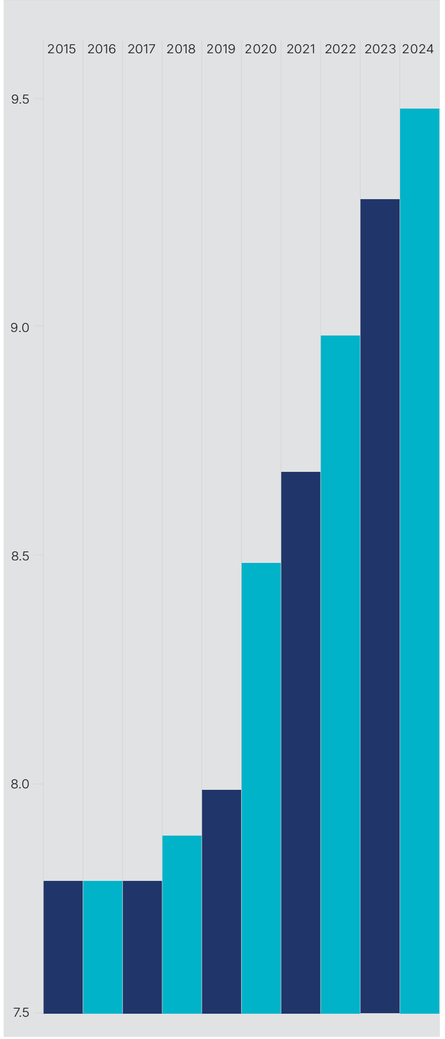
Today, eight in 10 new cars are available with Advanced Driver Assistance Systems (ADAS), including Adaptive Cruise Control, Autonomous Emergency Braking, Lane Keeping Assist and Blind Spot Monitoring.[22]

While safety and security must remain paramount consideration must be given to how progressively more sophisticated in-vehicle cabin displays, tethering to our smartphones and increasing connectivity, can be accessed by different market operators. These systems can display a variety of apps and services so different operators in the SMR sector should maintain equal access to engage with consumers through them

Vehicles are becoming increasingly technically advanced, but they are also staying on the road for longer with the average age of a car on UK roads rising from eight years in 2019 to 9.5 years in 2024.

Considering the average age of cars at their end of life is around 14 years, internal combustion engines (ICE) vehicles will remain in the parc for a long time post-2030, albeit in decreasing numbers.[23]

INCREASE IN AVERAGE VEHICLE AGE (10 YEARS)



HOW DO DRIVERS ACCESS SERVICE AND REPAIR?

We asked 2,001 car owners a range of questions about the use of their car, their opinions on technology including EV and ADAS and their preferences in how they run their vehicles.

Almost three quarters (72%) said that they preferred to take their vehicles to an independent channel for SMR and are using the breadth of options available for this, including workshop chains, local independents and mobile/driveway services.

The panel shows the breakdown of these options and how the one-site independent garage holds sway in the popularity stakes with nearly a third opting to visit them or use their mobile services.[24]

72% prefer to take their vehicle to an independent workshop

WHERE DO YOU USUALLY TAKE YOUR CAR FOR SERVICING AND MAINTENANCE?[25]

The majority of drivers (76%) would use a mobile or a collection/delivery service from a workshop, but only just over a third of respondents said they would be prepared to pay a premium for them.

It is notable, however, that younger drivers are more prepared to pay a premium with the 25- to 34-year-old cohort the most willing at 63% of respondents and the 17- to 24-year-old cohort next at 43%. Conversely, just 15% of those over the age of 55 said they are prepared to pay for the added convenience.[26]

12.0%	A workshop of a large national chain
6.7%	A mobile service from a large national chain
12.8%	A workshop of a small independent chain of a few garages
4.9%	A mobile service from a small independent chain of a few garages
25.9%	A one-site independent garage
6.3%	A mobile service from a one-site independent garage

63% (17-24) vs **15%** (over 55)

Younger drivers are more prepared to pay a premium for collection/delivery service from a workshop

81% of businesses are equipped to service electric vehicles

77% can maintain ADAS systems

But among those not yet ready: **Only 10%** are investing in EV capability

SECTOR SENTIMENT AND NEXT STEPS

In this section, we examine the industry's response in terms of skills development, investment, understanding of consumer demands and its outlook for the future.[28]

We explore survey results, which sought views from consumers with vehicles and aftermarket businesses – including a variety of independent and franchised workshops, to assess how closely aligned workshops and consumers are in their views, particularly regarding the future evolution and development of the MOT.

Overall, the sector is positive about its prospects with 94% of respondents saying they believe business will improve over the next 12 months.

Buoyancy is also apparent around new and emerging technology with 81% equipped with the tools and skills to service electric vehicles and 77% the ability to maintain ADAS systems.

Of those that feel they are unable to cater for these vehicles, however, only 10% are investing in capability to cover EVs and just 5% in ADAS.

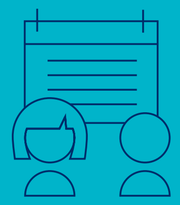
A recurring theme in conversation with SMMT members is the challenge of skills: attracting talent, developing and upskilling staff alongside retaining the workforce. The Institute of the Motor Industry reports that vacancy rates in the aftermarket industry are among the highest in the UK.[29] Currently standing at around 23,000 vacancies, the research forecasts that the figure is projected to rise to 29,000 by 2035 without targeted investment.

A shortage of skilled technicians not only impacts workshop capacity but also slows the transition to electric vehicles by undermining affordability and accessibility.

Twice as many workshops feel that electric vehicles will provide them with opportunities rather than challenges over the next five to 10 years and this sentiment is echoed in confidence around staff upskilling, with 45% seeing it as an opportunity versus 19% who view it as a challenge.

Of those that are investing in skills to deal with EV and ADAS, the majority are spending less than 1.5% of their turnover, although eight in 10 expect to increase this investment over the next year.

This is extremely welcome, since an alarming 78% said they expected significant numbers of key staff to retire within the next one to four years, while only 5% said they have no vacancies to fill, and nearly 20% said they have difficulty in attracting the right staff.



CHANGING WORKFORCE

78%
said they expected significant numbers of staff to retire within the next four years

FRIENDLY, KNOWLEDGEABLE STAFF

17%
of workshops think it is important

33%
of consumers say it's a key factor

CONVENIENT LOCATION

20%
of workshops think it is important

41%
of consumers say it's a key factor

QUALITY COUNTS AND THE PART THAT PARTS PLAY

We asked both consumers and workshops about the advantages of the independent aftermarket to see how well they aligned.

The most selected option, for both cohorts, was quality of repairs, with just two percentile points difference.

Alignment around expectations is close on speed of service, pricing transparency and competitive pricing.

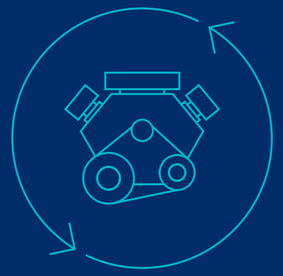
One of the biggest deviations between workshop and consumer perspectives is around the importance of friendly and knowledgeable staff. Only 17% of workshops thought this was important to consumers but a third of owners would look for this in selecting where to bring their cars.[30]

There is also a mismatch in the importance of convenient location. Only a fifth of workshops thought that it was important to consumers, but twice as many drivers (41%) said it was a deciding factor for them.

We also asked about parts choice. A notable difference between workshops and consumers here is around the use of alternative parts from businesses which do not supply to vehicle manufacturers. While nine out of 10 workshops would be happy to use these parts, nearly a third of consumers said they would rather not have them used on their vehicles.

Workshops and consumers are well aligned and both very open to using remanufactured parts – 90% of workshops and 80% of owners would prefer or consider using them.

While 86% of workshops would prefer or consider a used part which has not undergone the same rigorous cleaning, stripping, rebuilding and testing processes as a remanufactured component, nearly half of consumers would rather not have these used on their vehicles.



REMANUFACTURED PARTS

90%
of workshops

80%
of vehicle owners

Would prefer or consider using remanufactured parts

THE ROLE OF REGULATION

The automotive SMR sector is a complex ecosystem comprising a wide range of different operators. Regulation plays a vital role in balancing these different interests to ensure fair competition and consumer choice.

BLOCK EXEMPTION

The Motor Vehicle Block Exemption Order (MVBEO)[31] and its supporting Guidance Notes[32] governs the rights of independent operators to access information, tools and technical information to work on vehicles both within, and after, their warranty period.

The UK's MVBEO includes a specific excluded restriction covering this point – "a restriction of the ability of an independent operator to access information, tools or training... for the purposes of providing repair and maintenance services for motor vehicles of a particular make".

TYPE APPROVAL AND SERMI

In addition, both GB and EU Whole Vehicle Type Approval (WVTA),[33] which cover GB and Northern Ireland respectively, contain provisions requiring vehicle manufacturers to provide unrestricted, standardised and non-discriminatory access to technical repair and maintenance information.

Although it is not currently subject to regulation in Great Britain, the EUWVTA mandates the Security-related Repair and Maintenance Information (SERMI) scheme as a mechanism for the access of sensitive vehicle security information by aftermarket operators that aims to assure vehicle manufacturers that this information is only being used by bona-fide business.[34]

The real-world benefit of SERMI in delivering those requirements remains to be seen having only recently been rolled out in the EU, but if it proves successful, consideration should be given to its introduction in GB, whether through regulation or via a voluntary scheme.

UN ECE REGULATION

A small number of replacement parts such as braking, lighting and some emissions control components, are covered by UNECE Regulations for road use. While it is perfectly legal to sell and use products for off-road use such as for track days, without approval to those regulations, distinguishing between road and non-road use can be challenging, particularly for online marketplaces.

Policies do exist, however, to highlight rules on parts which cannot be sold under any circumstances, such as recalled or rebuilt airbags, and efforts are made to remove listings where such products are identified.

The DVSA's Market Surveillance Unit (MSU), is responsible for enforcing the type approval regulations, including the provision of technical data and the sale of compliant products including, those suitable for on-road versus off-road use as given in the example above.

SMMT aftermarket members have welcomed the DVSA's efforts to identify braking products available to purchase on the market which do not conform to necessary standards.

Prosecutions for selling non-compliant products for road use are also welcomed but the work is often costly and complex.

THE MOT

While the MOT aims to ensure roadworthiness on the day of testing, advances in vehicle technology have created greater complexity in what is designed to be a simple, affordable and non-invasive test. The current emission tests, for example, struggle to detect the removal of emissions control equipment or the fitment of substitute parts where the emissions from a modern vehicle may require extremely accurate measurement equipment to detect changes, whereas in previous times a simple, visual smoke test could be applied to diesel vehicles, for example.

Introducing checks to identify the fitment of a non-approved parts, the removal of a part or functionality of a system would certainly add to complexity and potentially the cost, of the test but it could deliver additional environmental and/or safety benefits.

Following the 2023 MOT consultation, work began between the Department for Transport (DfT), SMMT, its members and other industry stakeholders exploring how to include ADAS in any potential MOT reform.

A key barrier to expanding the scope of the MOT may be cost. A review of MOT fees – unchanged since 2010 – together with a full cost benefit analysis of introducing new test equipment, could help address inflationary pressures and support the introduction of this more advanced, but necessary, testing.

The UK's Construction and Use Regulations (1986), as amended, place requirements on owners/operators to keep their vehicles roadworthy within certain conditions. These regulations should be kept under review to address the introduction of new technologies and the UK's new regulatory frameworks following the UK's exit from the EU as well as the ability for DVSA and the police to conduct roadside checks.

THE RIGHT TO REPAIR

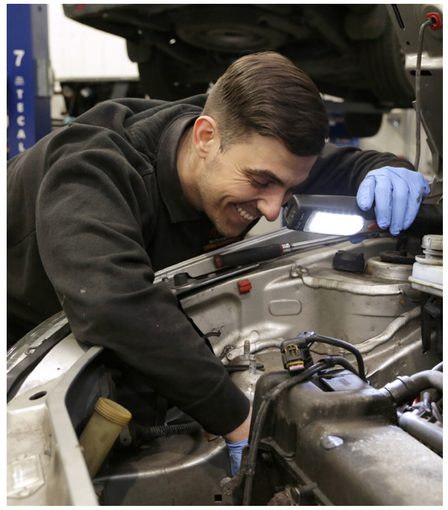
The MVBEO, and the EU block exemption which preceded it, have, for decades, specifically dictated that drivers are free to take their vehicles to independent workshops for service and repair at whatever vehicle age, including within any warranty periods.

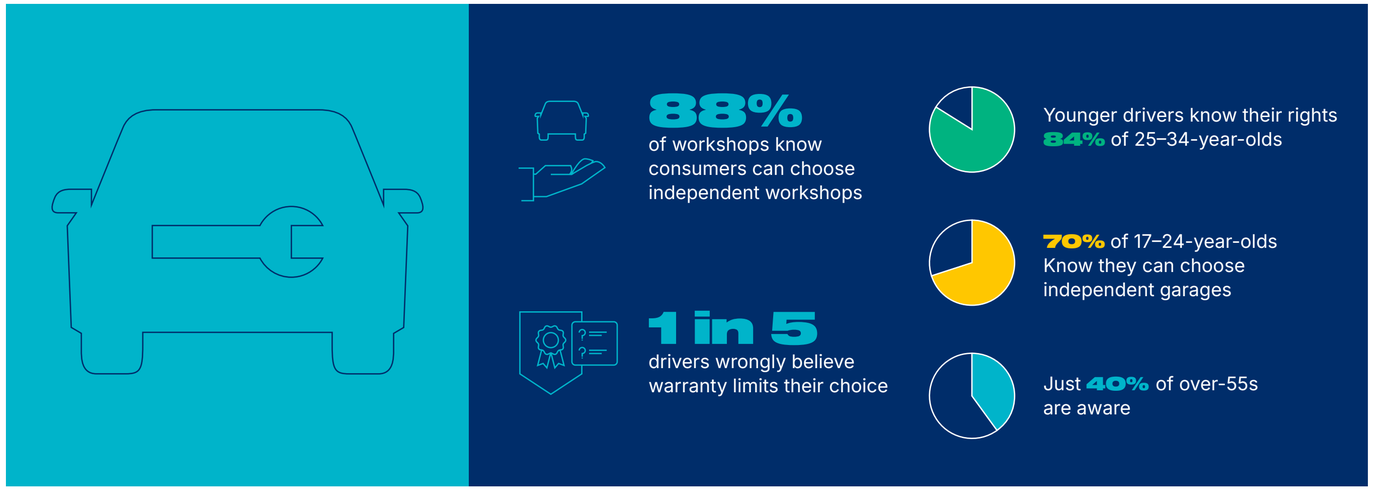
The last remaining restrictive clauses in new car warranties were removed following action by the then Office of Fair Trading, now the Competition and Markets Authority, in the early 2000s.

However, consumers are not necessarily aware of this, with nearly one in five drivers mistakenly believing that cars under warranty cannot be serviced by an independent garage. Encouragingly, younger drivers show greater awareness with 84% of 25- to 34-year-olds and 70% of 17- to 24- year-olds recognising they are free to select an independent versus 40% of those aged over 55 years.[35]

Industry awareness is understandably higher, with 88% of respondents in our survey of workshop businesses reporting that they are aware of consumer rights in this area. Just under one in 10 said they were not allowed to work on vehicles in warranty, with small businesses of between one and nine employees the most likely to misunderstand (21%).

The service and repair sector is, overall, positive about the role that regulation plays in supporting freedom of choice for consumers, with 88% agreeing it is supportive, although more than half feel there is not enough enforcement.





88%
of workshops know consumers can choose independent workshops

1 in 5
drivers wrongly believe warranty limits their choice

Younger drivers know their rights **84%** of 25–34-year-olds

70% of 17–24-year-olds Know they can choose independent garages

Just **40%** of over-55s are aware

WHY THE MOT MATTERS

A quarter of drivers say they rarely or never check their tyre tread depth. Tyre pressure monitoring systems have probably helped to improve the situation regarding inflation, but 15% still say they pay no attention to this critical aspect of maintenance.

Furthermore, a third of drivers never check or replace windscreen wipers, while 42% do not bother with bulb checks.

All of these items are leading failures at the MOT, which our previous research has shown is highly valued by drivers. In terms of additional checks at the MOT, 51% of drivers would value ADAS being added and 43% support enhanced emissions checks. Meanwhile, six in 10 workshops support ADAS inclusion in the MOT while 65% believe improved emissions testing is needed.

Considering the MOT maximum fee has not increased since 2010, and that MOT is likely to become more complex, it is unsurprising to find that 94% of workshop respondents feel it should be increased.

WHAT SHOULD BE CHECKED?

ADAS Systems
Workshops:
60% support inclusion

Drivers:
51% want it added

Enhanced Emissions Testing
Workshops:
65% support it

Drivers:
43% agree

MOT fee – time to change
94% of workshops say the fee should increase

RECOMMENDATIONS

FOR GOVERNMENT

- Ensure access to technical repair and maintenance data for independent operators through GB WVTA and the MVBEO. These regulations ensure fair competition, consumer choice and value, and their application should be tested and enforced thoroughly the DVSA's Market Surveillance Unit.
- The MSU should also effectively monitor the use of non-compliant replacement parts being used on-road and illegal modification.
- Accelerate stakeholder collaboration on MOT reform. Updates to the fee structure, test content and operational flexibility are needed to reflect modern vehicle technologies. Mandatory ADAS checks and enhanced emissions testing should be introduced, particularly as ICE vehicles will remain in circulation beyond 2040. A full cost benefit analysis should be done to ensure a realistic and proportionate MOT is in place to deliver the real-world benefits of modern vehicle technologies.
- Introduce capital investment relief for vehicle test stations and workshops upgrading equipment to meet enhanced MOT standards.
- Boost industry skills development. Increase the release of unused apprenticeship levy funds to small businesses, simplify apprenticeship systems and expand access to non-apprenticeship training pathways.
- Consider need to mandate SERMI in Great Britain. Greater confidence in the scheme would encourage the establishment of Conformity Assessment Bodies in GB and support a framework with a potential to deliver technical information exchange between vehicle manufacturers and workshops in areas outside of security.

FOR THE AUTOMOTIVE INDUSTRY

- Strengthen collaboration between vehicle manufacturers and the aftermarket. Easier access to technical information enhances customer experience, brand perception and affordability.
- Engage insurers and stakeholders in joint efforts with manufacturers and the aftermarket to improve confidence and affordability in repairs – especially for complex vehicles and EVs.
- Invest in workforce skills and modern equipment to keep pace with evolving technologies.
- Recognise the value the consumer places on friendly and knowledgeable communication and the location convenience that the aftermarket is able to provide them.

FOOTNOTES:

1 https://www.smmt.co.uk/smmt-motor-industry-facts-2024/
2 https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey
3 https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey
4 https://www.smmt.co.uk/about/history/
5 https://www.rac.co.uk/about-us
6 https://www.theaa.com/about-us/aa-history
7 https://www.smmt.co.uk/vehicle-data/smmt-vehicle-data/
8 https://www.smmt.co.uk/about/history/
9 https://www.gov.uk/government/consultations/changes-to-the-date-of-the-first-mot-test-and-research-into-other-mot-enhancements/changes-to-the-date-of-the-first-mot-test-and-research-into-other-mot-enhancements
10 https://www.smmt.co.uk/about/history/
11 https://www.smmt.co.uk/about/history/
12 The research was conducted by Censuswide, who surveyed a consumer sample of 2,001 17+ full driving licence holders who own and drive a car alongside 250 18+ Decision makers in businesses involved in the service, repair and maintenance of vehicles. The data was collected between 19.08.25 - 27.08.25. Censuswide abides by and employs members of the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.
13 https://www.eurocarparts.com/ and https://www.gsfcarparts.com/about-us
14 https://www.gov.uk/government/news/vehicle-owners-to-be-granted-mot-exemption-in-battle-against-coronavirus
15 https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey
16 https://www.smmt.co.uk/smmt-motor-industry-facts-2024/
17 Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
18 https://www.smmt.co.uk/vehicle-data/smmt-vehicle-data/
19 https://www.smmt.co.uk/vehicle-data/smmt-vehicle-data/
20 https://www.gov.uk/government/publications/vehicle-emissions-trading-schemes-how-to-comply
21 https://www.euroncap.com/en/about-euro-ncap/timeline/
22 https://www.smmt.co.uk/smmt-motor-industry-facts-2024/
23 https://www.smmt.co.uk/vehicle-data/smmt-vehicle-data/
24 Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
25 Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
26 Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
27 https://www.smmt.co.uk/vehicle-data/smmt-vehicle-data/
28 Survey of 250 business decision makers in service, maintenance and repair conducted between 19/08/2025 and 27/08/2025 and Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
29 https://tide.theimi.org.uk/industry-latest/news/ev-infrastructure-boost-risks-backfiring-without-skills-investment-warns-imi
30 Survey of 250 business decision makers in service, maintenance and repair conducted between 19/08/2025 and 27/08/2025 and Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025
31 https://www.legislation.gov.uk/uksi/2023/501/made
32 https://www.gov.uk/government/publications/cma-guidance-on-motor-vehicle-agreements
33 https://www.vehicle-certification-agency.gov.uk/vehicle-type-approval/gb-type-approval-scheme/ and https://www.vehicle-certification-agency.gov.uk/vehicle-type-approval/european-community-whole-vehicle-type-approval-ecwvta/
34 https://www.vehiclesermi.eu/
35 Survey of 250 business decision makers in service, maintenance and repair conducted between 19/08/2025 and 27/08/2025 and Survey of 2001 motorists by Census between 20/08/2025 and 27/08/2025

SMMT
DRIVING THE
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